

NAME OF INSTITUTION: ADDRESS: CONTACT PERSON: TITLE: _____ TELEPHONE NO: _____	NO FILING FEE	
SUPERIOR COURT OF CALIFORNIA, COUNTY OF STREET ADDRESS: MAILING ADDRESS: CITY AND ZIP CODE: BRANCH NAME:		
<input type="checkbox"/> GUARDIANSHIP <input type="checkbox"/> CONSERVATORSHIP OF (Name): <div style="text-align: right;"><input type="checkbox"/> MINOR <input type="checkbox"/> CONSERVATEE</div>		
NOTICE OF OPENING OR CHANGING A GUARDIANSHIP OR CONSERVATORSHIP ACCOUNT OR SAFE DEPOSIT BOX		CASE NUMBER:
<p style="text-align: center;">NOTE TO FINANCIAL INSTITUTION</p> <p>When a guardian or conservator of the estate of a person opens or changes the name on an account or a safe deposit box in a "financial institution" (a bank, a trust, a savings and loan association, a savings bank, an industrial bank, or a credit union), Probate Code section 2892 requires the financial institution to file a statement with the court having jurisdiction over the guardianship or conservatorship and identified in the Letters of Guardianship or Letters of Conservatorship. The statement must contain the information specified below concerning the account or safe deposit box. The statement must be on this form and must be signed by an authorized officer of the financial institution.</p>		

1. Account or safe deposit box information

- a. Financial institution (*name*):
- (1) Branch:
- (2) Branch address:
- (3) Branch telephone no.:
- b. Account status (*check one*):
- (1) ☐ New account opened on (*date*): _____ reflecting the guardianship or conservatorship.
- (i) Account number:
- (ii) Opening balance:
- (2) ☐ Existing account changed on (*date*): _____ to reflect the guardianship or conservatorship.
- (i) Name on account prior to change (*state each name*):
- (ii) Account number: Prior to change: _____ After change: _____
- (iii) Balance of account immediately after change: \$ _____
- c. Name of person who opened new account or rented safe deposit box, or whose name was added to existing account or safe deposit box (*state each name*):
- d. New safe deposit box number, or current number after change:
- e. Describe each asset held in a safe deposit box, including any policy or other identification number:

2. The guardian or conservator presented Letters of Guardianship or Letters of Conservatorship that identify the guardian or conservator as guardian or conservator of the estate of the ward or conservatee.

3. I am an officer of the financial institution identified in this statement, and I am authorized to sign this statement on its behalf.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date:

(TYPE OR PRINT NAME)

(AUTHORIZED SIGNATURE)

Title:

Telephone no.: